

## GUIDE FOR ORGANIZING AND COMPLETING PROJECT MANUAL

This guide describes the requirements for organizing and completing the OSE-required front end documents for the typical large construction project. The Project Manual should include the following in the order shown (see Appendix B).

### A. Table of Contents

1. Use the OSE formatted Table of Contents found in Appendix A.
2. Follow the instructions in *italics* to incorporate the technical specifications.

### B. Form SE-310, Invitation for Bids

All sections of the SE-310, pages 1 & 2, shall be completed with appropriate wording and boxes checked. Submit a separate copy of pages 1 and 2 with the Construction Documents submittal. DO NOT include page 2 in the Project Manual, even for review purposes. The SE-310 included in the bidding documents shall bear the State Engineer's signature unless the project is within Agency construction certification.

#### 1. Form SE-310, Page 1

- (a) Fill in the complete project name and number as determined in Chapter 1.
- (b) Fill in the project location, e.g., city or county.
- (c) Indicate the requirements for Bid Security: Bid Security is required for all competitive sealed bidding for construction contracts in excess of \$50,000.
- (d) Indicate the requirements for Performance Bond and Labor and Materials Payment Bonds to be provided if a contract is awarded. Performance Bond and a Labor and Material Payment Bond are required on all construction projects when the estimated cost for construction is \$50,000 or greater.
- (e) Indicate the project Estimated Construction Cost Range. The standard entries are:
 

|                         |                          |                           |
|-------------------------|--------------------------|---------------------------|
| < \$100,000             | \$100,000-\$500,000      | \$500,000-\$2,000,000     |
| \$2,000,000-\$5,000,000 | \$5,000,000-\$10,000,000 | \$10,000,000-\$20,000,000 |
| > \$20,000,000          | \$750,000 max IDC        |                           |
- (f) Give a full description of the scope and requirements for the project, including Bid Alternates and any requirements that significantly affect the scope of work or the qualifications of the bidders or sub-bidders.
- (g) Fill in the complete name, address, telephone number, fax number, and email of the A/E. If the project was designed in-house, fill in the agency's information.
- (h) Indicate the plan rooms and cities where bidding documents are on file, where they may be obtained, and the amount of deposit, if required.

**NOTE:** The amount of the required deposit should approximate the actual cost of printing. Any deposit over \$30 shall be refundable to all those returning the bidding documents, including subcontractors and suppliers, in good condition within 10 days after the bid opening.

- (i) Indicate requirements for a Pre-Bid conference by checking the appropriate boxes. Fill in date, time and exact location.

**NOTE:** The OSE recommends a minimum of 14 calendar days from the date of advertisement to the date of any pre-bid conference.

- (j) Fill in the complete name, address, telephone number, fax number and e-mail of the agency and the agency coordinator. The agency coordinator should be the person designated by the Agency to respond to questions and to provide information regarding this project.
- (k) Fill in the Bid date, time and exact location for hand or mail delivery of bids. The "Mail Delivery" address must include the street address.

**NOTE:** The OSE recommends a minimum of 14 days from the date of any type of pre-bid conference to the date for receipt of bids. When there is no pre-bid conference, the OSE recommends a minimum of 21 days from the date of advertisement to the date of receipt of bids.

- (l) Indicate if the project is estimated to be within Agency Construction Certification by checking the appropriate box.

2. Form SE-310, Page 2

- (a) Fill in the project number and name the same as shown on page 1 of the SE-310.
- (b) Fill in all Budget information.

- (1) The Total Approved Project Funding is the total amount shown on the most recently approved A-1 form, or, for a Non-PIP, the budget established by the Agency for this project.
- (2) The Agency Construction Budget for this Contract is an amount that represents the available funds allocated for this contract, including contingencies.
- (3) The Final Estimated Construction Cost cannot be greater than the Agency's Construction Budget for this contract. This is the A/E's final estimate of the bid award amount, including all Bid Alternates, as approved by the Agency.
- (c) Provide the requested project data.
- (d) Indicate the A/E's submittal of plans to local authorities. This is a requirement of the OSE to support the construction inspection requirements, therefore, an explanation must be given if the submittal was not made. Include the name and telephone of the local authorities, whether or not a submittal was made.
- (e) Fill in ALL Flood Hazard information.

**NOTE:** This is required regardless of whether or not the project is in a flood hazard area.

- (f) Fill in all information regarding status of permits and approvals required for the project.

**NOTE:** Copies of all permits **MUST** be submitted to the OSE prior to bid advertisement.

- (g) The Agency's Project Coordinator shall sign and date the form SE-310. Include the Coordinator's title.

C. AIA A701 The Agency may elect to omit an original document at its discretion, provided a replacement page is inserted with information stating where prospective bidders may view the document (i.e., the A/E's or Agency's offices).

D. 00201-OSE Standard Supplemental Instructions to Bidders

1. Complete the indicated paragraphs in Article 9 with project information.

- (a) Fill in Subparagraph 9.1 with the Project name, number and location.
- (b) Fill in Subparagraph 9.2 with the name of the Agency, designated purchasing office, address of that office, agency representative, agency representative contact information and special documents required, if any, for the project. If no special documents are required, insert "NONE."
- (c) Fill in Subparagraph 9.3 with the location of the posting of the Form SE-370, as determined by the Agency.
- (d) Fill in Subparagraph 9.4 with only Other Special Conditions for this Work, such as listings of Agency's specific campus requirements, Federal Funding requirements, etc. OSE must approve these conditions prior to advertisement. If there are no special conditions, fill in "NONE".
- (e) Modifications by insertion of additional (sub) paragraphs in this form are not permitted.

2. Upon request, OSE will provide suggested wording to be included in Article 9 for projects involving hazardous materials.

## Form SE-330, Bid Form

## 3. Page BF-1

- (a) BID SUBMITTED BY: No action by A/E or Agency, to be filled in by Bidder.
- (b) BID SUBMITTED TO: Fill in the Agency name.
- (c) FOR PROJECT: Fill in the complete project number and name.
- (d) BID SECURITY, Item 2: No action by A/E or Agency, appropriate box to be checked by Bidder.
- (e) ADDENDA, Item 4: No action by A/E or Agency, to be filled in by Bidder.
- (f) Item 5: Fill in the blank for the period of time for acceptance of bid. Use numerals to indicate days. Normally insert "60".
- (g) BASE BID WORK: Insert the Base Bid work description as it appears in the description of the project on the project Form SE-310. Omit any references to Bid Alternates and contractor qualifications.
- (h) BASE BID: No action by Agency, to be filled in by Bidder.

4. Page BF-1A (*Delete page if no Bid Alternates or Unit Prices are included*)

- (a) ALTERNATE BASE BID WORK: Insert a description of each Alternate Base Bid. Describe each in sufficient detail here to clearly indicate the intent of the Alternate Base Bid and the location in the construction drawings and project manual.
- (b) UNIT PRICE WORK: The A/E may use these lines to request Unit Prices on items that involve a specific quantity in the Base Bid, and that quantity may need to be modified during construction. Unit price quotes may be for additional items which are not in the Base Bid Work or in Alternate Bid Work, but which are unique. Unit price requests are to be filled in with the No., Item, and Unit columns by the A/E. The Bidder is to fill in the Add and Deduct Columns with his quotes in numerals.

**NOTE:** Unit prices are not to be used to determine the low bidder, responsiveness or responsibility, unless otherwise stated in the Bidding Documents, i.e., for award of an Indefinite Delivery Contract.

## 5. Page BF-2, Listing of Subcontractors

- (a) BASE BID WORK: The Agency, in consultation with the A/E, shall identify by specialty all subcontractors who are expected to perform work or render service to the prime contractor and whose subcontracts to the contractor are each expected to exceed 3% of the prime contractor's Base Bid.

**NOTE:** A subcontractor specialty shall not be listed if the work of that specialty is a subclassification included within the scope of the prime contractor's license. Refer to the provisions of §40-11-410 of the SC Code of Laws, as amended, for information.

- (1) "Subcontractor" is as defined in the Form SE-330. Material suppliers, manufacturers and fabricators are not subcontractors and are not to be listed.
- (2) In the event the Agency and A/E determine that no subcontractor listing is required on BF-2, the words "NO SUBCONTRACTOR LISTING REQUIRED" shall be included on this page below Subcontractor Specialty column.
- (3) The Agency may list other subcontractor specialties, regardless of the expected value of their work, but only if the Agency determines that the work of that subcontractor is vital to the success of the project. The OSE strongly discourages this practice.
- (b) ALTERNATE BASE BID WORK: Fill in subcontractor listings for Alternate Base Bids only if the work of the alternate subcontractor specialty is estimated to be more than 3% of the Base Bid.

**NOTE:** The determination of which subcontractor specialties are listed in the Bid Form is not protestable by prospective bidders.

## 6. Page BF-3

## (a) TIME OF CONTRACT PERFORMANCE

- (1) DATE OF SUBSTANTIAL COMPLETION: Fill in number of calendar days allowed for construction. The Agency, in consultation with the A/E, shall determine the time allowed to reach substantial completion for the work. This time shall take into consideration the 5 days per month for adverse weather included in the contract time.
- (2) DATE OF FINAL COMPLETION: Fill in number of calendar days allowed. The Agency, in consultation with the A/E, shall determine the time from Substantial Completion to Final Completion for the work. This time is normally 30 days.

## (b) LIQUIDATED DAMAGES AND EARLY COMPLETION AWARD

- (1) STEP ONE-LIQUIDATED DAMAGES: Fill in the dollar amount to be retained for each day the project is not substantially completed within the specified or adjusted contract time for Substantial Completion. Typical items to be considered for Step One-Liquidated Damages are those costs or expenses that the Agency would incur if the Agency is unable to have unimpeded occupancy or use of the project in the specified or adjusted contract time. Some examples of these are:
  - Additional costs for agency personnel working on the project;
  - For asbestos abatement projects, the cost of additional air monitoring paid by the Agency;
  - For dormitory projects, rental and/or other costs incurred for temporary housing for students, or for loss of student generated revenue because students could not be accepted;
  - Agency costs for displacement of departments or other agency functions delayed from occupying the facility, or other justified inconvenience to the Agency;
  - Additional interest or other monetary expense charged against Agency funding; and
  - Additional costs to the Agency generated by the A/E during the extended time, such as personnel directly involved with the project.
- (2) STEP TWO-LIQUIDATED DAMAGES: Fill in the dollar amount to be retained for each day the project is not finally completed within the specified or adjusted contract time for Final Completion. Items to be considered for Step Two-Liquidated Damages are those costs or expenses that the Agency would incur should the contractor not Finally Complete the project in the specified or adjusted contract time.
- (3) EARLY SUBSTANTIAL COMPLETION AWARD: Fill in amount for Early Substantial Completion Award. Typical items that may be considered for early substantial completion award are those revenues or other demonstrable benefits the Agency would gain should the contractor substantially complete the project before the specified contract time. This option should be used only with discretion and when the Agency has determined it will receive tangible benefits as a result of early completion. Normal projects would enter "0" on this line.

## 7. Page BF-4

No action required by the Agency or the A/E. To be completed by the Bidder.

## E. AIA A101

1. The Agency may elect to omit the original document at its discretion, provided a replacement page is inserted with information stating where prospective bidders may view the document (i.e., the A/E's or Agency's offices).
2. A/E shall insert 00501-0SE but shall not include the filled out A101 in the Bidding Documents unless originals of the A101 are used.
3. This document shall be completed in conformance with the "Instructions for Completion of STANDARD FORM OF AGREEMENT BETWEEN OWNER AND CONTRACTOR (AIA Document A101 – 1997 Edition)", which is found in Appendix B.

**F. AIA A201**

1. The Agency may elect to omit the original document at its discretion, provided a replacement page is inserted with information stating where prospective bidders may view the document (i.e., the A/E's or Agency's offices).
2. The Agency shall insert 00811-OSE completed as follows:
  - (a) Article 15.1 — fill in Project Number.
  - (b) Article 15.2 — fill in Project Name.
  - (c) Article 15.3 — fill in information as indicated for typical inspection requirements. Inspection requirements are discussed in detail in paragraph 5.27.
    - (1) Indicate which typical inspections are required for the Project.
    - (2) Insert the name and telephone number of the inspection entity(s) that will perform the required typical inspections.
    - (3) At the A/E's discretion, typical inspection requirements may be inserted in Section 01400 "Quality Assurance" of the technical specifications. If this approach is taken, insert in article 15.3 a statement referring the bidder to section 01400 for typical inspection requirements.
  - (d) Article 15.4 —list the cash allowances, if any. Indicate amount of each allowance and Project Manual specification section in which each is located. If none enter "NONE."
  - (e) Article 15.5 —fill in requirements for record drawings, if any. If none, enter "NONE."
  - (f) Article 15.6 —fill in requirements for shop drawings, if any. If none, enter "NONE."
  - (g) Article 15.7 —fill in requirements for temporary signage, on-site office, utilities, restrooms, etc. If none, enter "NONE."
  - (h) Article 15.8 —fill in additional requirements for project cleanup. If none, enter "NONE."
  - (i) Article 15.9 —list all attachments that modify the General Conditions, if any. If none, enter "NONE."
  - (1) Additional Agency-created Supplementary Conditions may be used with the prior approval of the OSE.
  - (2) Upon request, OSE will provide suggested wording to be included in the Supplementary Conditions for projects involving hazardous materials.

**G. Technical Specifications**

1. Insert all technical specifications into the project manual.
2. Include in Section 01400 "Quality Assurance" all requirements for Special Inspections.